# Setup a web chat

1.   Overview

A web chat provides several channels of communication between agents and clients. Using the Yabbr web chat portal, agents can reach out to clients by communicating via Email or SMS.

Yabbr's web chat system leverages SMS and Email templates, and a booking system to provide a queue-based approach towards handling client communications. During a web chat session, an agent can transfer the client to another agent, prompt the client to create a booking and modify client details on the go.

The web portal also provides transcripts and usage statistics for web chats.

2.   Starting a new webchat (Agent only).

- ○   Login to the Yabbr portal.
- ○   From the dashboard, click the Chat button on the top right.
- ○   On the web chat window, click the New Chat button.
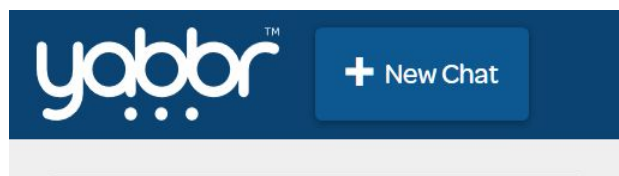
○ This should open up a new widget that inputs the new chat information, including message type, agent name (from) and recipient (phone number). Clicking start after entering these details will open up a new chat with the intended user. Here, the agent can choose either SMS or Email chat.

3. SMS Chat

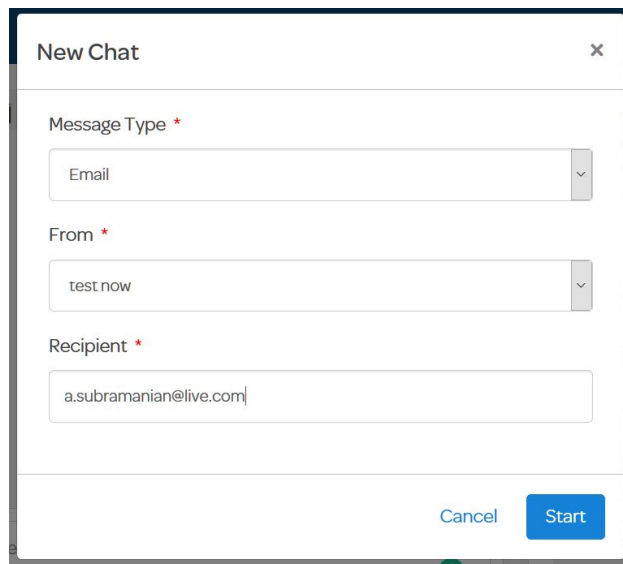○ If a user's number is entered after the SMS option is selected, a chat window opens with an SMS interface.
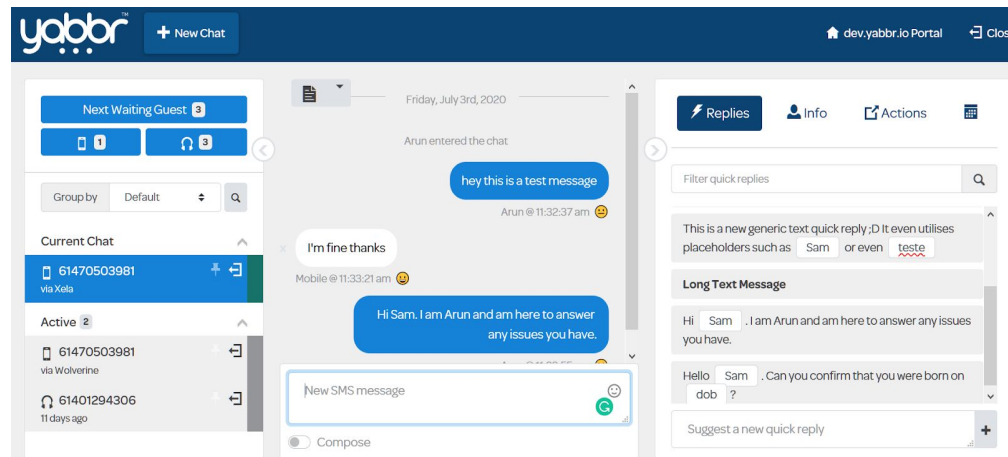
○ The content section provides a familiar chat interface. Sending and receiving SMS messages can be done in this part. Only text messages can be sent and received.

○ The left sidebar shows current and active SMS, emails and phone calls. The current chat conversation can be ended or restarted from the icons available here.

○ The right sidebar provides several options:

- "Replies" section has templates that agents can select from. These templates have pre-filled text and placeholders for new text. New templates can be added (these have a 1000 character limit).
- "Info" section can be used to add more information about the current chat. This is more of a log system to add more info about the client and the conversation itself.
- "Actions" section can be used to transfer the current guest to a different agent. A dropdown with the available agents is displayed and selecting an agent will transfer the active guest to him/her.
- "Calendar" section can be used to make a booking for any future date, without impacting the current conversation.

4. Email Chat

- If a user's email id is entered after the Email option is selected, a chat window opens with an Email interface.
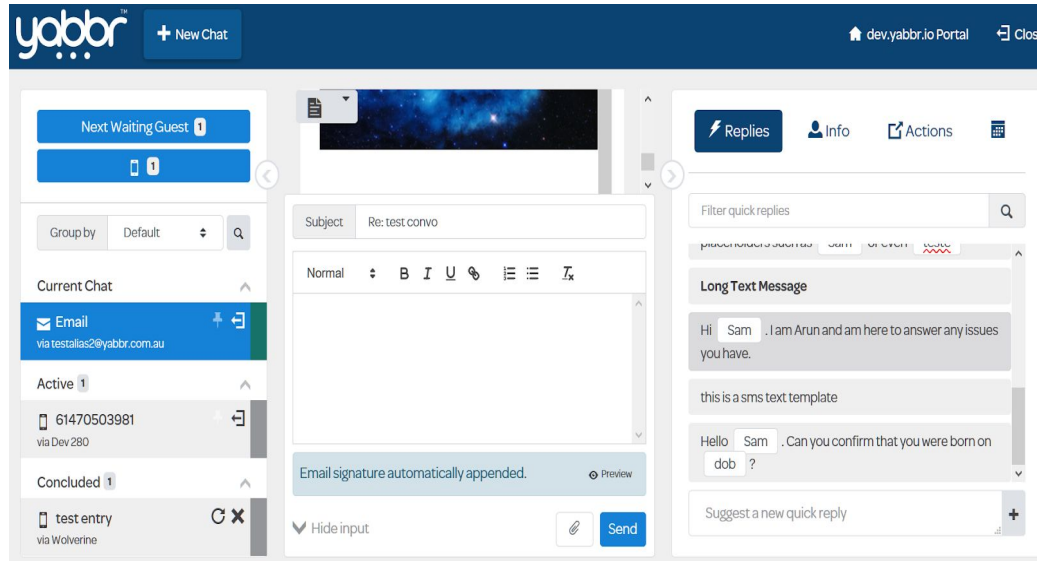
○ The content section provides a familiar chat interface. Sending and receiving Emails can be done in this part. This conversation supports both plaintext and HTML.

○ The left sidebar shows current and active SMS, emails and phone calls. The current chat conversation can be ended or restarted from the icons available here.
○ The right sidebar provides several options:
   ■ "Replies" section has templates that agents can select from. These templates have pre-filled text and placeholders for new text. New templates can be added (these have a 1000 character limit).
   ■ "Info" section can be used to add more information about the current chat. This is more of a log system to add more info about the client and the conversation itself.
   ■ "Actions" section can be used to transfer the current guest to a different agent. A dropdown with the available agents is displayed and selecting an agent will transfer the active guest to him/her.
   ■ "Calendar" section can be used to make a booking for any future date, without impacting the current conversation.
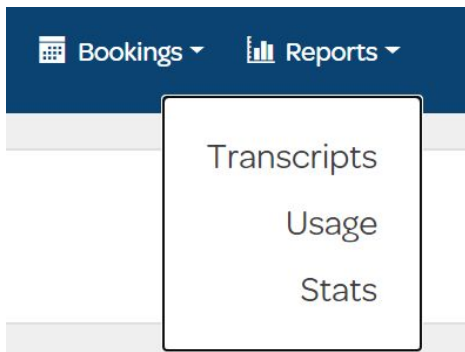
6. Chat Queue

- ○ When an agent logs in to web chat, the chat queue of current and waiting guests can be found on the left sidebar.
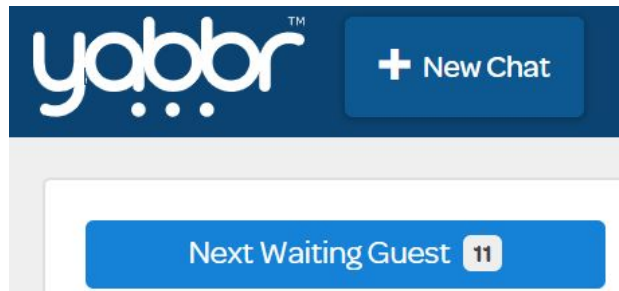
- ○ An agent can then chat to a client waiting in the queue, or receive a transferred client from another agent.

7. Reporting

- ○ On the Yabbr portal, Reporting options are provided under the Reports tab.

- ○ This provides chat transcripts and usage statistics for reporting.
- ○ A copy of a specific chat can also be fetched through the transcript button on the chat window.